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# POLAND

## Introduction

The fight against poverty is considered as one of the seven priorities of the Europe 2020 Strategy (Lisbon Strategy 2010).<sup>1</sup> Its idea is based on the need to build smart, sustainable economic growth that would not only make wider social integration possible, but also—and above all—help 20 million people to get out of poverty and social exclusion. Therefore, it is not surprising that the Cooperation Platform established in 2010 has initiated the European Year for Combating Poverty and Social Exclusion and the globalized concentration of researchers, NGOs, institutions, and various communities on the phenomenon of poverty has coincided with the activities undertaken against the negative effects of the financial crisis. Despite the fact that it is difficult to estimate their benefits and scope, the measurable effects certainly include various programs and projects realized in the member states of the European Union which absorbed several million euro. However, even more important are immeasurable effects, for example raising public awareness that the problem of poverty and social exclusion concerns not only those who are marginalized, homeless, or living in the extreme (absolute) poverty but is also an issue that may touch one-fifth of the population of each country.

The paper aims to present basic data on the scale and social composition of poverty in Poland, including the procedures used to counteract its further spread by Polish government and NGOs. Due to the limited nature of the study, the above-delineated issues have been illustrated in a broad outline.

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<sup>1</sup> The Lisbon Strategy 2010, Europe 2020—the EU's growth strategy for smart, sustainable and inclusive economy, [http://ec.europa.eu/europe2020/index\\_en.htm](http://ec.europa.eu/europe2020/index_en.htm). Accessed 31.10.2014.

## Poverty and Social Exclusion—Terminological Findings

The image of the poor, as well as the poverty stereotypes are shaped not only by academic and political discourse but also or even more by media one. As a result, this image has been dominated by such notions as: inappropriate, passive, and alienated. By society and employees of assistance institutions the poor are seen as lazy, dishonest, very demanding, weak, helpless, not ambitious, and stupid (Rogers-Dillon 1995; Seccombe, James, and Walters 1998; Stuber and Kronebusch 2004; Bullock 2004). In turn, the statistics show that poor people are mainly unemployed, disabled, uneducated rural residents that come from large families. In all the above perspectives, the poor are perceived as not adjusted to the requirements of the modern world and somehow 'different', because they not only look and dress differently, but also manage received resources in a different manner, and, as a result, do not lead similar lives, which in this case means 'worse' than the rest of the society that tends to stigmatize those who for various reasons are unable or unwilling to meet social expectations.

Poverty falls into this category of concepts within which different terms difficult to define clearly can be found. This is understandable as poverty is a multi-dimensional and complex phenomenon that cannot be pushed into rigid and inflexible frames with many analytical perspectives and interpretative planes. Hence the choice of a particular definitional base determines the methods used to estimate the scale and the scope of the phenomenon (e.g. Carbonaro 1992, 15–42). This means that depending on theoretical assumptions, in practice poverty may include various social groups.

One of the elements that link all the concepts of poverty which can be found in the scientific literature is the notion of deficiency. This deficiency can naturally take different forms and make a whole discussion about poverty even more complicated. As Małgorzata Łobacz rightly observes: “‘Poor’ means as much as a poor girl without wealth, a person devoid of happiness, things he or she wishes. Yet, the concept of poverty relates in the first place to material shortages, but it also refers to the physical and spiritual shortages, that is, disability, moral, intellectual, linguistic, and cultural shortages, as well as to the lack of supernatural wealth” (Łobacz 2011, 9). Thus, poverty can also be seen from the perspective of social and mental ‘efficiency’, the scope of which is determined by each society separately. Here the sociological perspective seems to be irreplaceable as it allows us to analyze the problem of poverty from the point of view of the difficulties in addressing the primary and secondary needs. However, in general terms, being poor is most commonly associated with the inability to get elementary resources that each of us needs simply to survive, such as food, shelter, or clothing.

Among many various definitions of poverty the most popular are: the World Bank proposal which treats poverty “as the inability to achieve a minimum standard of living” (World Bank 2002), as well as the concept of the Council of Minis-

ters EEC, according to which “poverty refers to persons, families or groups of persons whose resources (material, cultural, and social) are limited to the extent that their standard of living is beyond the accepted minimum in their country of residence” (Kordos and Ochocki 1993, 3). Nevertheless, both definitions should rather be considered more as a starting point, which supplemented by such concepts as a minimum acceptable standard of living or acceptable minimum, can lay the groundwork for determining the real scope of poverty. “It is easy to note that such a formulation of this concept leads to the extension of basic needs, the realization of which—along with the development of a society—is considered necessary. This, however, results in increasing the value of the boundaries (not only material) below which the poverty threshold begins and the range of needs considered essential for a decent life are identified (Ciura 2002, 2).

In Poland, the extent of poverty is legally determined by indicators of an economic nature. It means that poverty is defined in this case by reference to the category of income, fixed by the two essential parameters which include: range and depth. When illustrating the scale of poverty a particular measure (poverty rate/at-risk-of-poverty measure) is used, which is calculated by dividing the number of poor individuals or households by the corresponding number of units in the whole population. While multiplied by one hundred it determines the percentage of the poor in a given community (GUS 2013). When it comes to the depth of poverty, it is important to estimate the percentage of the average income below which the poverty line commences (Szukielojć-Bieńkuńska 2009, 3). As a result, the poverty line can be considered in both absolute and relative terms. In the case of absolute poverty people are seen as poor when the incomes they achieve are too low to meet the needs identified as basic ones (there is no reference to the standard of living of other members of society). When it comes to the relative poverty it is rather defined in relation to the inequalities between individual layers of a given society. From this perspective, the poor are those whose standard of living is much lower than the standard of living of other groups (GUS 2009, 43).

Polish legislation that, among others, specifies social assistance tasks, social assistance benefits, and the way they are awarded, social assistance organization, as well as control rules and procedure in this field of social assistance are generally included in the Social Welfare Act (Dz.U.R.P. [Journal of Laws] 2004),<sup>2</sup> which also indicates the statutory poverty line showing the amount of income that entitles individuals to apply for additional cash benefits. Such a right is granted to a person whose income does not exceed PLN 542 and in the case of persons living in the shared household it is PLN 456.<sup>3</sup>

<sup>2</sup> The Act of 12.03.2004 on social security. Obwieszczenie Marszałka Sejmu Rzeczypospolitej Polskiej z dnia 14 XI 2012 r. w sprawie ogłoszenia jednolitego tekstu ustawy o pomocy społecznej zostało ogłoszone w Dzienniku Ustaw 7.02.2013 r. (pozycja 182).

<sup>3</sup> The data are valid from October 2012. Earlier ratios were as follows: for single household—PLN 477, while for other households—PLN 351.

## Polish Dimension of Poverty Geographic and Demographic Characteristics

The basic criteria for determining the dimension of poverty in Poland are as follows:

- *relative poverty line* (defined as half the value of the average expenditure of all households);
- *statutory poverty line* (designating the amount entitling to apply for social assistance support);
- *extreme poverty line* (or the subsistence level, which refers to the sphere of goods that satisfaction cannot be postponed).

It is the Central Statistical Office (GUS) that is responsible for the measurement of the indicators of economic poverty based on household budget surveys. It takes into account a few poverty lines: "Taking into account several, not one selected line results from the fact that none of them has been chosen as an official border and from the methodological point of view there is no reason to prefer one of them indisputably" (GUS 2013, 5). An overview of the scale of poverty in the years 2000–2013, taking into account the above-mentioned poverty lines are presented in Table 1 (economic poverty in Poland, according to the poverty levels).

In each case an increasing trend can be seen in the number of people at risk of poverty in the years 2002–2005. After this date, a gradual decline in indicators is noticeable; however, in the various categories of poverty this process is characterized by different dynamics. In the case of the relative poverty rate its highest value was recorded in 2003 (20.4%), while now it is 16.2%, which means that such part of Polish households spent less than 50% of the total average expenditure of all households in Poland. The highest number of persons entitled to benefit from the social assistance funds was registered in 2004 (19.2%), the lowest in 2011 (6.5%). In 2013, this ratio increased to 12.8%. However, the indicated intensity may result from the changes that have taken place within the methodology used to determine the level and threshold of social intervention and not from the real number of persons covered by this kind of intervention. The lowest rate fluctuations were recorded in the case of extreme poverty. In 2005, 12.3% of persons lived in the households with expenditures below the poverty level (breadline). In 2008, this ratio was 5.6%; now again its increase can be seen (in 2013 it reached a value of 7.4%), which can be explained by an increase in the minimum subsistence level. According to the data presented by the Institute of Labor and Social Affairs "the values of subsistence minimum baskets in 2013 increased depending on the type of household by about 4.0% to 4.5%, while the general increase in the prices of consumer goods and services was only by 0.9%" (Institute of Labor and Social Affairs 2014, 3).

Polish poverty is also diversified geographically and demographically. This means that it is inconsistent in social and territorial terms. Here are the main conclusions:

**Table 1.** Economic poverty in Poland according to different poverty lines

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	(%)													
Relative poverty line	17.1	17.0	18.4	20.4	20.3	18.1	17.7	17.3	17.6	17.3	17.1	16.7	16.3	16.2
Statutory poverty line	13.6	15.0	18.5	18.1	19.2	18.1	15.1	14.6	10.6	8.3	7.3	6.5	7.2	12.8
Extreme poverty line	8.1	9.5	11.1	10.8	11.8	12.3	7.8	6.6	5.6	5.7	5.7	6.8	6.8	7.4

Source: GUS. Household expenditure surveys [Badania budżetów gospodarstw domowych], [www.gus.pl](http://www.gus.pl). Accessed November 2014.

1. There is a strong correlation between individual and financial situation of households and their professional activity. Those who are outside the labor market are particularly vulnerable to poverty, especially to extreme poverty. In households where there is at least one unemployed person the extreme poverty rate was 14% in 2013;<sup>4</sup> whereas in the case of the households with at least two inactive persons it was 33%.
2. The analysis of poverty from the perspective of the type of households clearly shows that large families (with four children or more dependents) are most at risk of poverty (both extreme and relative, as well as statutory one). In 2013, these were respectively 22.8%, 46.7%, and 49.8%. Single parents cope relatively well in this field. Here the indicators are lower than in the case of households with 3 children, the least poor are single households or those without children.
3. Among the socio-economic groups such as workers, farmers, self-employed, retirees, pensioners, and others living on unearned sources, the highest rate of the absolute poverty risk was noted in the case of people living on unearned sources (22.4% in 2010, 21.5% in 2013), then pensioners (9.7% in 2010, 13.2% in 2013), and farmers (9.0% in 2010, 13.4% in 2013). The least vulnerable group were self-employed (3.8% in 2010, 3.9% in 2013) and retired (3.8% in 2010, 4.8% in 2013). Disturbing is the fact that except for a small decline in the number of people living on unearned sources of income (in 2012—22.6%, in 2013—21.5%), in all other cases an upward trend can be seen. This means that in comparison to 2010, the extreme poverty risk indicators have risen steadily.
4. Another element determining the Polish dimension of poverty is the existence of a strict relationship between the level of poverty and the level of education. Basically, it can be assumed that the lower the education level of the head of family is, the greater the likelihood that such a family will have to deal with extreme poverty. Particularly alarming is the fact that these trends do not change over the years; the extreme poverty risk rate for the households in which a head of the family has at most lower secondary education is from 16% to 17%.
5. Another negative tendency is the relationship between risk of poverty and age. In this context, the most vulnerable are two age categories. The first of them are children and young people up to 18 years old (here the extreme poverty risk rate in 2013 was about 10%). The problem of poverty 'rejuvenation' (Kabciz 2011, 13) seems to be even more serious; the data compiled by the European Commission indicate that about 30% of Polish children and young people is in a group of people at the risk of poverty and social exclusion (Kabciz 2011, 12). This means that Poland is in the forefront of the most vulnerable countries to the problem of so-called inheritance of poverty, or, in other words, the transfer of poverty from generation to generation. The second group are older people. Here the ratio is 7% (it takes into account a person over 65 years of age).

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<sup>4</sup> All the presented data come from the reports prepared and compiled by the Central Statistical Office: [www.gus.pl](http://www.gus.pl). Accessed November 2014.



6. Polish dimension of poverty is also defined through the prism of disability; among households in which at least one disabled person lives in the extreme poverty rate is 11%.
7. In recent years, due to the economic crisis and the economic difficulties, more and more attention is paid to an increase in the risk of poverty among economically active persons. The phenomenon that is called 'the working poor' covers about 11% of all employed in Poland and is even more dangerous as it corresponds to the demographic poverty burden signalled in Section 5. The problem of the working poor most often affects young people who just enter the labor market, as well as older people who, due to their age or health problems, have limited opportunities to search for alternative sources of employment. This means that there is a real likelihood of further impoverishment of the members of these two age groups in the future.

At the same time, the analysis of poverty by place of residence leads to the following conclusions:

1. Poverty much more often threatens residents of rural areas; in 2013, 60% of villages inhabitants struggled with the problem of extreme poverty, while among the urban community it was only 4.6%.
2. There is considerable regional variation of poverty in Poland which corresponds with still existing division on two categories: 'Poland A' (richer) and 'Poland B' (poorer). Following this distinction, the most difficult situation is in the following provinces: Kujawsko-Pomorskie (12%), Podlaskie (11.6%), Świętokrzyskie (11.5%), Lubelskie (11.3%); few people live at the risk of poverty in Śląskie (4.9%) and Mazowieckie (5.3%). In the regions with the highest rate of extreme poverty, a growing trend can be observed over the past few years. Clearly visible are the disparities in the level of the risk of poverty when it comes to local communities, cities, and districts (districts, enclaves of poverty).

## Polish Government's Strategy

Polish government activity that is focused on preventing poverty and the fight against the existing consequences of this problem is centered on the document being a result of 'Europe 2020' (National Reform Program 2014). The update made in the 2014 (Update 2014/2015) organizes the action methods outlined in Section 3.5: "The purpose of the anti-poverty actions." The data presented in this document are alarming—the poverty risk rate and/or social exclusion in 2012 was 26.7%. This means that Poland is in the group of the countries with a high value of this ratio (the National Reform Program 2014, 51).



To reduce existing disparities between Poland and the rest of Europe specific priorities within 2014–2020 financial perspective have been set, among which the most important are as follows:

1. Implementation of policies that promote equal opportunities and employability;
  2. Streamlining and improving the quality of health care services and social services;
  3. Activation of social entrepreneurship and vocational integration, especially in social enterprises and related social economy;
  4. Increasing in capital expenditures to promote health and social infrastructure.
- The indicated points are not exhaustive; they only show a few areas of operations that should lead to reduction of the number of people being at the risk of and/or affected by poverty by 1.5 million.

At present, the activities listed in the work schedule for the years 2014–2015 within 'National Program of Action against Poverty and Social Exclusion 2020' are being realized, and thus five operational objectives have been identified:

1. Services for activity and prevention—reducing the exclusion of children and young people;
2. Guarantees for the future of youth—create an opportunity for young people to enter the labor market;
3. An active person, an integrated family—responsible local environment;
4. Prevention of uncertainty housing;
5. Seniors—safe, active, and needed (National Reform Program 2014, 52–54).

## The Role of NGOs

The fight against poverty involves not only national and local authorities, but also citizens whose initiatives often transform into institutional forms of assistance to others. Currently, there are about 4,5 thousand organizations undertaking activities within social services and social assistance, which is 7% of all non-governmental organizations (Herbst and Przewłocka 2011, 30). However, one should bear in mind that the data can be falsified in two ways: firstly, a significant part of the organizations have multi-level character, which is why they cannot be attributed to only one thematic area (the number of organizations involved in the fight against poverty may be higher); secondly, not all officially registered organizations still exist—some of them remain in the registry although they are no longer active (the number of these organizations may be therefore lesser). Leaving the problems of the estimation apart, it is worth indicating the services provided by them and their predominant types. Most often they engage in actions that bring help for disabled or sick persons (about 58%), support dysfunctional and poor families, or families with many children (48%), as well as taking short-term or cyclical assistance actions to help people

who are extremely poor (38%). More specific actions are as follows: (1) direct provision of services to members, dependents, clients; (2) representation and advocacy; (3) organizing mutual financial or material support for individuals; (4) financial support to other organizations and institutions; (5) organizing debates, seminars, as well as conferences; (6) conducting portals or websites; (7) mobilizing and educating the public opinion; (8) publishing magazines, newsletters, reports; (9) organizing events to promote and animate the cooperation between organizations and institutions in Poland and in the world; (10) support other non-governmental organizations; and (11) participating in debates with the public administration, lobbying, influencing system changes (Herbst and Przewłocka 2011, 38).

Among the organizations functioning in the social space the most well-known seem are the following: Wielka Orkiestra Świątecznej Pomocy Jerzego Owsia-ka, Fundacja Polska Akcja Humanitarna Janiny Ochojskiej, Akcja „Pajacyk,” Towarzystwo im. Brata Alberta, Caritas Polska, Banki Żywności, and others. In their activity they often take advantage of various media, including the Internet, where special services for non-governmental organizations are created whose mission is to help (e.g. Siepomaga.pl).

Despite the huge contribution in providing assistance to the poor, they still cannot count on the support from the Polish state. As Szarffenberg notes “the development of social organization is not supported by the state policy. Despite the fact that the state says a lot about the fight against social exclusion, it does not involve social organizations, especially financially. Organizations do not participate in solving the problems of poverty to such an extent as they could” (Setniewska 2013).

The lack of coordinated rules of cooperation between the state and non-governmental organizations only multiply problems; perhaps a broader public discussion would lead to the elaboration of relevant legislation in this field.

## Conclusion

The previous discussion on poverty in Poland focused mainly on the institutionalized forms of poverty perception reflected in the concrete figures, therefore on the objective recognition of the problem, computed without reference to individual estimates and judgments made in this regard. Meanwhile, no less important is the subjective attitude to the question of poverty, where personal feelings and opinions are as much important as other factors. This means that the figures do not necessarily correspond to the number of people subjectively evaluating themselves as poor. Hence 22% of Poles believe that about 10% or less remain poor in Poland (for comparison, in 2007 it was 18%). At the same time, less people believe that it is between 26–50% of the total population (in 2012 it was 31%, in 2007—

35%). Estimates remain unchanged when it comes to the opinions that 11–25% of the population is poor; both in 2012 and 2007 such an answer was chosen by 18% of respondents (CBOS 2012, 5). Among the indicators of poverty, the most often indicated problems were those with the satisfaction of basic needs (97%), paying bills (95%), lack of suitable housing (80%), unemployment (77%), while the main causes of poverty are the lack of work (53%), life helplessness, and inability in dealing with one's own problems (46%).

Particularly important are data on the perception of the problem of poverty in Poland in comparison to other European countries. Over the past few years, the number of people who believe that poverty is the problem of Polish citizens to more extent than the citizens of other European countries has increased (Polish respondents believe that this problem touches every third citizen, while the average for the 27 countries is 21%) (Social Eurobarometer). What is more, according to research cited above, in Polish society there is a belief that in the near future the number of people at risk of poverty will gradually increase (CBOS 2012, 11).

The problem of poverty in Poland is a problem that causes many social pathologies, such as alcoholism, crime, drug addiction, homelessness, or violence. What is of particular concern is the strong correlation between poverty and marginalization, and social exclusion, leading to a continuous or periodic lack of participation in the most important aspects of life: economic, political, social, or cultural.

Polish dimension of poverty is determined primarily by the increased risk of children poverty and the working poor that can certainly be regarded as a negative element distinguishing Poland from other European countries. These areas and issues need in-depth, comprehensive measures covering not only economic, but also social and political policy.

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## **Polska**

### **S t r e s z c z e n i e**

Artykuł podejmuje próbę usystematyzowania danych dotyczących zakresu i charakterystyki polskiego ubóstwa. Pierwsza część pracy poświęcona została rozważaniom teoretycznym, zdefiniowaniu analizowanego zjawiska i identyfikacji kluczowych sposobów patrzenia na problem z punktu widzenia polskiego prawa. W dalszej części zaprezentowano podstawowe dane odzwierciedlające zróżnicowanie geograficzne i demograficzne ubóstwa w Polsce w przeciągu ostatnich kilku lat. Autorka również przedstawiła najważniejsze działania strategiczne podjęte przez polski rząd w celu zapobiegania ubóstwu i organizacje pozarządowe w udzielaniu pomocy ubogim.

Dorota Nowalska-Kapuścik

## **Pologne**

### **R é s u m é**

L'article essaye de systématiser les données concernant l'étendue et les caractéristiques de la pauvreté polonaise. La première partie du texte a été consacrée aux considérations théoriques, à la définition du phénomène analysé et à l'identification des moyens principaux d'examiner ce problème du point de vue du droit polonais. Dans la partie suivante, on a présenté les données de base reflétant la différenciation géographique et démographique de la pauvreté en Pologne pendant les dernières années. L'auteure a présenté aussi les mesures stratégiques principales entreprises par le gouvernement polonais dans le but de lutter contre la pauvreté et les organisations non gouvernementales visant à porter assistance aux pauvres.